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Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

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Summer Travel Shows Increase in 1990

Despite concerns that summer travel would be down this year due to economic conditions and the Middle East crisis, overall summer travel increased more than 2 percent in 1990.

During the months of June, July and August, there were a total of 437 million person-trips, according to the Data Center's National Travel Survey. (A person-trip is one person traveling 100 miles or more away from home).

"It was not a banner year for summer travel in terms of growth, but the numbers show that it was not as bad as many feared," said Suzanne Cook, executive director at the Data Center.

Vacation travel remained relatively stable this past summer, but still maintained the high level of volume reached last summer, increasing 1.5 percent with more than 326 million person-trips. The increase in 1990 summer travel was mainly due to the record number of vacation trips in August, a more than 8 percent increase over the previous August.

One reason for the increase in August could have been the invasion of Kuwait earlier in the month. "The Middle East crisis may have induced people to travel more in August, in anticipation that travel prices would skyrocket," according to Elizabeth Stewart, manager of survey research at the Data Center.

According to the Data Center's survey, travel to the Midwest and Great Lakes showed substantial increases from the previous summer. More favorable prices and aggressive promotional campaigns could be reasons for the large increases in the Midwest and Great Lakes regions.

In fact, three out of the five states that make up the Great Lakes region rank in the top 20 highest state advertising budgets for 1989-90.

Travelers this summer again preferred auto travel as their mode of transportation. Auto person-trips increased 4 percent in 1990 with more than 353 million person-trips. Automobile trips were shorter in length this past summer. The average round-trip distance dropped from 630 round-trip miles last summer to 600 round-trip miles this past summer.

Air travel in terms of person-trips, on the other hand, showed a decrease of nearly 5 percent this past summer. One of the major reasons for this decline was the hike in airline fares this past summer.

Four-fifths of the summer 1990 person-trips were taken for pleasure purposes. Of these, 46 percent of the travelers stayed with friends/relatives, while 36 percent stayed in commercial lodgings.

The number of hotel-related person trips decreased nearly 3 percent this summer with 189 million person-trips.

Average round-trip distances during the summer 1990 were lower, overall, than those a year ago, while average trip duration decreased or stayed the same in almost every category. People traveling this summer went an average of 830 round-trip miles and spent, on the average, 4.4 nights away from home.

The average travel party size this summer dropped more than 4 percent. Even though travel by the 18-34 age group decreased more than 2 percent, they still traveled more than any other age group.

The National Travel Survey summer report, *Summer Travel Market Report*, will be available in January and can be purchased for $100. For additional information on the Summer Travel Report, contact Elizabeth Stewart at (202) 293-1040.

Don't Forget...

The Fifth Annual
Travel Review Conference
Omni Shoreham Hotel, Washington, D.C.
February 4, 1991

Rising Airline Fares Lead Travel Price Increase

Following a notable increase in October, the cost of travel in the United States rose 0.2 percent in November. The increase was largely due to a 3.6 percent jump in airline fares, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 141.3 (1982 - 84 = 100) during November.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) rose 0.2 percent to 133.8.

Travel Price Index and Components

November 1990 TPI Components	Monthly % Change Oct. 1990 to Nov. 1990	Annual % Change Nov. 1989 to Nov. 1990
Transportation	1.5	28.5
Airline Fares	3.6	18.6
Other Intercity Trans.	0.3	6.1
Intracity Public Trans.	0.3	7.5
Motor Fuel	0.1	36.5
Lodging	-0.5	14.2
Food and Beverages		
Away From Home	0.3	4.6
Entertainment	0.4	6.4
TRAVEL PRICE INDEX	0.4	12.1
CONSUMER PRICE INDEX	0.2	6.3

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

For the fourth consecutive month, motor fuel costs increased, bringing on a sharp rise in airline fares. Both of these price increases are due in large part to the Middle East crisis. Motor fuel also showed the highest increase over the last 12 months, increasing almost 37 percent over a year ago.

Overall transportation costs rose 1.5 percent in November, and jumped more than 28 percent over the last 12 months. While showing a slight decrease in November, the cost of lodging while out of town rose more than 14 percent over one year ago.

Over the past 12 months, the TPI rose 12.1 percent, influenced greatly by rising motor fuel costs. The CPI rose more than 6 percent over the same 12 month period.

Pleasure Travel Increases 6 Percent in September

Despite a troubled economy, overall travel grew more than 4 percent in September 1990 over last September with more than 116 million person-trips taken by U.S. residents, according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

Analysts believe that the diminished fears of a fuel shortage aided in the growth of pleasure travel. Pleasure travel, which showed the highest increase for the second month in a row, jumped more than 6 percent over the previous September with 86 million person-trips.

Vacation travel increased more than 2 percent in September, after increasing 8 percent in August. The average duration of a vacation trip also increased from an average of 3.9 nights last September to 4.1 nights this September.

Even though pleasure travel showed the largest increase in September, Americans stayed closer to home, perhaps in an attempt to offset rising fuel costs. The average round-trip distance for pleasure travel decreased from 850 round-trip miles last September to 650 round-trip miles this year.

Automobile travel jumped 8 percent with nearly 93 million person-trips. Travelers who used the automobile as a mode of transportation traveled shorter distances, dropping from 630 round-trip miles last September to 520 round-trip miles this September.

The average party size remained stable, with an average of less than 2 persons per trip in September. Vacation travel showed a slight decrease in the average party size, while the average party size for pleasure travel remained stable this past September.

Regional travel remained consistent, as the Great Lakes, Midwest and West showed increases in September, while the Northeast and Southeast experienced declines in traveler volumes due largely to their troubled economies.

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TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

Rockefeller to Speak at Forum

Senator John D. Rockefeller (D-WV) will be this year's keynote speaker at the fifth annual Travel Review Conference on February 4, 1991 at the Omni Shoreham Hotel in Washington, D.C.

Senator Rockefeller has been a strong advocate of tourism in the United States and currently serves as chairman of the Subcommittee on Foreign Commerce and Tourism. Elected to the Senate in 1984, Rockefeller has pushed numerous initiatives to bolster tourism in his home state of West Virginia.

Martin Shugrue, Jr., trustee at Eastern Airlines, will discuss the growth of the travel industry and in particular the status of the airline industry. Shugrue, former national chairman of the Travel Industry Association of America (TIA), in his distinguished career in the travel industry, has also served as Pan American's vice chairman and chief operating officer.

Suzanne Cook, executive director of the Data Center, will take a look at national trends in 1990 domestic travel and Harvey Shields, acting director, Office of Research at the United States Travel and Tourism Administration (USTTA), will review 1990 international inbound and outbound to and from the United States.

The conference is co-sponsored by the Data Center, USTTA and the Travel and Tourism Research Association (TTRA). Registration fees for USTDC, TTRA members and USTTA International Tourism Conference attendees is $180. Others can register for $200; students can register for $100.

For additional information or to register for the conference, contact Vernon Azucenas of the Data Center at (202) 293-1040.

Visitor Volume at National Parks

Region	OCT 1990 visits	% Change from OCT 1989	Year to Date % Change 1990/89*
NEW ENGLAND	1,625,078	6.0%	1.0%
MIDDLE ATLANTIC	2,510,001	-6.1	-16.4
SOUTH ATLANTIC	7,100,842	-1.4	-2.6
EAST SOUTH CENT.	1,771,319	-15.2	-19.7
EAST NORTH CENT.	441,132	-17.3	-1.6
WEST NORTH CENT.	538,536	-3.8	-0.1
WEST SOUTH CENT.	666,254	-17.0	-7.9
MOUNTAIN	2,853,090	-5.5	2.7
PACIFIC	3,586,380	-10.7	-9.1
TOTAL	21,092,632	-6.0	-5.8

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

Discoveries..

Expenditures in the meetings market have grown 236 percent from $11.8 billion in 1979 to $39.6 billion in 1989, according to the 1990 Meetings Market Study.

Corporate meeting attendance reached 58 million in 1989, a 23 percent increase over 1987. The study was prepared by *Meetings & Conventions Magazine*, which is published by Reed Travel Group.

The report measures the dimensions and tracks the changes in both corporate and association off-premises meetings. The report can be purchased for $200. Send orders to Mary Concorso at Reed Travel Group, 500 Plaza Drive, Secaucus, NJ 07096 or call (201) 902-1552.

To submit your company's travel research projects, send a brief description of the report, including the price, address, and contact name, to Scott Dring, U.S. Travel Data Center, 1133 21st Street, Washington, D.C. 20036.

Board of Trustees Elects Foster as 1991 Chairman

During its December 3 meeting in Memphis, the Data Center's Board of Trustees elected new members and officers for 1991. Jerry Foster, world-wide president of Travellers International in St. Louis, replaces Dr. John D. Hunt, who served two years as chairman.

Mr. Foster, who was previously president of Saga International Holidays, recently joined Travellers International, a land tour program for TWA getaway tour packages in Europe.

C. Reath Edwards, director of corporate marketing at Hershey Entertainment & Resort Co. will serve as the new treasurer.

Barbara Wickliffe, marketing research director of Best Western International replaces Jerry Foster as executive committee member.

Margaret Megee, director of the Tourism Division at the Texas Department of Commerce, and Sally Sussman, manager of public affairs, American Express Travel Related Services, are new trustees.

Officers remaining the same for 1991:

- Vice Chairman, Edward R. Book, president of the Travel Industry Association of America.
- Secretary, Dr. Charles R. Goeldner, professor of marketing, University of Colorado.

Current Travel Indicators - 1990

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Oct	$5,600	million	8.7	5.4	7.3
Eating and Drinking Places(2)	Oct	$15,290	million	-0.3	4.7	5.2
Gasoline Service Stations(2)	Oct	$11,998	million	3.2	23.7	9.4
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Oct	63.2	percent	-0.8	-1.9	0.7
Real Demand for Commercial Lodging(4)	Oct	67.5	million	6.4	1.5	3.6
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Oct	27.1	billion	7.8	1.3	2.7
	Nov	25.5	billion	-6.1	0.1	2.5
Int'l Revenue Passenger-Miles	Oct	9.4	billion	-10.3	12.2	16.3
	Nov	8.0	billion	-14.6	10.7	15.9
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Sept	44.6	billion	-12.6	2.1	3.7
	Oct	45.0	billion	1.0	0.6	3.4
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Oct	486.4	million	5.4	4.6	3.4
Travel Price Index (1982 - 84 = 100) (8)	Oct	140.7		0.8	11.4	7.4
U.S. Resident Travel						
Total Person-trips(9)	Sept	116.1	million	-23.2	4.3	3.4
Vacation Person-trips(9)	Sept	84.4	million	-28.3	2.4	4.1
Total Person-nights(10)	Sept	429.6	million	-39.5	5.6	6.9
Vacation Person-nights(10)	Sept	346.0	million	-43.5	7.2	6.0
Public Use of National Parks (11)						
Visits	Oct	21,092,632		-6.0	-5.8	-6.3
Overnight Stays	Oct	1,151,253		-43.8	-6.3	1.0
Foreign Arrivals to the U.S.						
From Overseas(12)	July	1,596,194		15.5	-4.7	5.9
	Aug	1,639,136		2.7	5.7	5.9
From Canada(13)	Oct	1,337,146		-13.7	9.6	12.9
From Mexico(12)	July	161,178		45.7	1.2	8.3
	Aug	156,784		-2.7	-5.3	5.6
U.S. Citizen Departures						
To Overseas(12)	June	1,748,100		22.5	10.1	9.4
	July	1,776,400		1.6	9.3	9.4
To Canada(13)	Oct	833,340		-34.0	2.4	1.1
Domestic Demand for Gasoline						
Barrels/Day(14)	Oct	7,034	thousands	2.0	-2.9	-1.7

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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